

City of Newton
Fiscal Year 2015

Assessor Use Only
MGL Ch 59 § 5 Clause 41A
 Date Received:

SENIOR 65 AND OLDER
APPLICATION FOR PROPERTY TAX DEFERRAL

General Laws Chapter 59, Section 5

**THIS APPLICATION IS NOT OPEN TO
 PUBLIC INSPECTION**

(See General Laws Chapter 59, Section 60.)

**Must be filed with the Board of Assessors on or
 before December 15, or 3 months
 after the actual (not preliminary) tax bills
 are mailed for the fiscal year if later.**

A. IDENTIFICATION. Complete section fully. Please print or type.

Name of Applicant _____

Marital Status _____ Tel No. _____ Date of Birth _____
 (If first year of application, attach copy of birth certificate)

Legal Residence (Domicile) on July 1, 2014? _____

Mailing Address (If different) _____

Parcel ID _____ No. of Dwelling Units: ☐ 1 ☐ 2 ☐ 3 ☐ 4 Other _____

Have you been granted an exemption in any other city or town this year? _____

If yes, name of City or Town _____ Amount Exempted \$ _____

Amount of tax you are seeking to defer this year \$ _____

Have you owned and occupied the property for at least 10 years? _____

If no, please list the other properties you owned and/or occupied during the past 10 years?

Address	From	To	Owned	Occupied
_____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>

DISPOSITION OF APPLICATION (ASSESSORS' USE ONLY)

_____ Ownership	_____ GRANTED	Assessed Tax	_____
_____ Occupancy	_____ DENIED	Exempted Tax	_____
_____ Status	_____ DEEMED DENIED	Deferred Tax	_____
_____ Income	Date Granted/Denied _____		_____
	Certificate No. _____		_____
	Date Cert/Notice Sent _____		_____
		Board of Assessors	

B. PERSONS WITH INTEREST IN PROPERTY

Did you own the property on July 1, 2014 as

Sole Owner ☐ Co-owner with Spouse Only ☐ Co-Owner with Others ☐ ?

Was there a mortgage on the Property as of July 1, 2014? Yes ☐ No ☐

If Yes, Amount Due on Mortgage\$_____ Name of Mortgagee(s)_____

Was property subject to a life estate as of July 1, 2014? Yes ☐ No ☐

If Yes, Name(s) of Remaindermen _____
(Person(s) receiving property after death)

Was property subject to a trust as of July 1, 2014? Yes ☐ No ☐

(If yes, and first year of application, or first year subject to Trust,
attach Trust Instrument and Schedule of Beneficiaries.)

If Yes, has the Trust changed since July 1, 2013? Yes ☐ No ☐

(If yes, attach new Trust Instrument and Schedule of Beneficiaries.)

C. GROSS RECEIPTS FROM ALL SOURCES IN PRECEDING CALENDAR YEAR:

Please attach a copy of your 2013 Federal Income Tax Return.

	Applicant & Spouse	Co-Owner & Applicant
Retirement Benefits (Social Security, Railroad, Federal, Mass., and Political Subdivisions)		
Other pensions and Retirement Allowances		
Wages, Salaries and other Compensation		
Net Profits from a Business or Profession		
Interest and Dividends		
Other Receipts (Rent, Capital Gains, etc.)		
Totals		

D. SIGNATURE

This application has been prepared or examined by me. I declare, under the pains and penalties of perjury, that to the best of my knowledge and belief, it and all accompanying documents and statements are true, correct, and complete.

Signature Date

If signed by an agent, attach a copy of written authorization to sign on behalf of taxpayer.